

## Chapter 4: Leading Sectors for U.S. Export and Investment

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### Commercial Sectors

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### **Power Generation Systems and Renewable Energy, ELP, REQ** [Return to top](#)

As outlined in the Business Overview, Alternative Energy programs are the major focus of the US mission in Sweden. These opportunities represent the primary focus of our commercial programs and therefore are listed as the first of our best prospects. The focus of this program is in five main areas:

1. Cellulosic ethanol and other 2nd generation biofuel production technologies;
2. Improved battery and auto engine technology;
3. Cost of producing electricity and heat from solar and wind;
4. Clean coal and carbon sequestration or CCS
5. Improved energy efficiency in homes and buildings.

We believe there are excellent opportunities in all of these areas to partner with and sell to the Nordic markets. One report predicts that the worldwide market for solar, wind, biofuels, and fuel cells products will grow from \$40 billion in 2005 to \$167 billion in 2015. The Swedish government is determined to take the lead in developing these technologies and has made a commitment to become fossil fuel independent by 2020. In addition, Swedish companies are major players in this effort around the world and are looking for superior technologies and partners to respond to the market demand and to meet domestic commitments. To promote this effort, the Commercial Service is organizing a Renewable Energy Trade Mission to Sweden in May 2008. We are very interested in hearing from companies that have products and solutions to offer in this sector.

### **Overview**

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	2005	2006	2007 (estimated)
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Total Market Size	4.250	4.450	4.910
Total Local Production	3.800	4.000	4.400
Total Exports	1.600	1.800	1.990
Total Imports	2.050	2.250	2.500
Imports from the U.S.	200	300	410

Exchange rates SEK/USD: 2005 7.48, 2006 7.38 and 2007 6.76

The statistics are unofficial estimates

The annual energy supply in Sweden amounts to approximately 624 TWh. Fossil fuels, such as oil, natural gas and coal, used by the transportation and refinery sectors, account for almost 32% of the current supply, followed by nuclear power, biofuels and hydropower. Renewable energy plays an increasingly important role in the Swedish energy system, and currently contributes almost 29% of the overall energy supply.

The main sources for electricity in Sweden are hydropower and nuclear power, accounting for 80% of the supply. The remaining 20% is covered by biofuels, wind power, conventional thermal power plants, and a small amount of photovoltaic and geothermal power.

Following the EU directives and regulations, Sweden is concentrating on improving and establishing long-term conditions for wider use of renewable energy resources, including new plant construction, R&D, incentives funding and industry harmonization. The government is committed to work on breaking the dependence on fossil fuels by 2020, and inclined to invest in renewable energy and power generation research and development to enable and alleviate the expanded use of bio-fuels and other renewable energy sources for electricity, heat and transportation. As noted in the overview, Embassy Stockholm, in line with U.S. policy to break dependencies on oil and combat Global Warming, has put the highest priorities on activities in this sector.

## **Best Prospects/Services**

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Equipment and plant technology for the upgrade of nuclear, hydropower and CHP plants; wind power turbine technology; solar and geothermal technologies; biomass processing technology; natural gas network technology and power grid infrastructure; renewable vehicle fuel production technologies.

## **Opportunities**

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In recent years fall and winter storms have caused wide and long-term power outages in several rural areas in Sweden. Power lines have been destroyed by falling trees and snow, and the repair work is very time consuming and dangerous. There are good opportunities for US companies supplying both power grid hardware and technology as it is necessary to modify the current grid infrastructure.

In order to meet the 2020 oil independency goal, Sweden needs to expand wind, solar and geothermal power production, further improve its biomass utilization and validate new technologies that enable efficient and cost-effective biofuel production. U.S. companies can provide world-leading product and technologies within many of these areas and have good opportunities in Sweden for cooperation and technology exchange.

## Resources

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Swedish Energy Agency [www.stem.se](http://www.stem.se)

Energy in Sweden [www.svenskenergi.se](http://www.svenskenergi.se)

Swedish Nuclear Power Inspectorate [www.ski.se](http://www.ski.se)

Svenska Kraftnat (National Grid Company) [www.svk.se](http://www.svk.se)

Swedish Bioenergy Association [www.svebio.se](http://www.svebio.se)

Major Trade Shows:

Sveriges Energiting, March 12-13, 2008, Stockholm, Sweden

- Sweden's by far largest and most important annual energy conference and exhibition

World Bioenergy Conference, May 27-29, 2008, Jönköping, sweden

- A professional meeting point for the bioenergy industry. Highlights the trends in the different markets and aims at developing and promoting bioenergy competences in a European and worldwide context.

Local Commercial Specialist: Tuula Javanainen, [Tuula.Javanainen@mail.doc.gov](mailto:Tuula.Javanainen@mail.doc.gov)

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## Travel & Tourism

### Overview

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US Million	2005	2006	2007 (estimated)
Total Market Size	14,900	16,300	18,550
Sales by local firms	2,100	2,310	2,550
Sales by foreign owned firms	8,900	9,300	9,800
Sales by US owned firms	4,100	5,100	6,200

The above statistics are unofficial estimates

Rate of Exchange: US\$1.00 equals SEK 6.67

Travel & Tourism is one of the largest industries in Sweden and the largest revenue earner in the United States. The total number of Swedish visitors to the US in 2006 was 290,000 a drop of 2 percent compared to 2005. Figures available for 2007 point to a substantial increase in numbers of visitors from Sweden. Each visitor spends approximately \$650 per day (excluding airfare). The dollar is less expensive now than the euro, which proves to be a great incentive for Swedish travelers. And tour operators report an increase in sales to the U.S throughout 2007. However, Thailand has become the most popular long-haul destination for Swedes. The United States has fallen behind and is now number two in the ranking.

### **Best Prospects/Services**

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Sun & Beaches, Big City Breaks, National Parks, Soft Adventure, Eco Tourism  
FIT travel is growing steadily

### **Opportunities**

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Sweden continues to offer great opportunities for U.S Travel and Tourism service providers, as well as for US destinations.

### **Resources**

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TUR, March 2008, Gothenburg      [www.tur.se](http://www.tur.se)      [www.swefair.se](http://www.swefair.se)

Discover America Promotional Events in Stockholm and throughout Sweden:  
[www.discoveramerica.se](http://www.discoveramerica.se)

Local Commercial Specialist: Birgitta Gardelius [Birgitta.Gardelius@mail.doc.gov](mailto:Birgitta.Gardelius@mail.doc.gov)

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### **Computer Software (CSF)**

### **Overview**

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U.S. million	2005	2006	2007 (est.)
Total Market Size	2,800	2,860	3,031
Total Local Production	1,686	1,730	1,834
Total Exports	916	928	984
Total Imports	2,030	2,058	2,181
Imports from the U.S.	1,568	1,589	1,684

Exchange rate used

USD 1 equals SEK	7.48	7.38	6.76
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The above statistics are unofficial estimates

The Swedish software market is sophisticated with skilled domestic software development companies. Sales are around USD 3 billion and the market is expected to increase by 6% in 2008 to reach sales of USD 3.2 billion. The Swedish software market consists of global software development companies and small, innovative niche-oriented companies. There are around 800 Swedish software development companies in Sweden, many of which specialize in systems software for communications, business systems (tax and accounting packages with local applications), and applications software for telecommunications. Security software is also a dominant segment among Swedish software developers.

Swedish customers are sophisticated IT users and are looking for the latest solutions that will increase customers service, cost savings and also enhance business processes. Demand is expected in the following segments: solutions for business intelligence, information management, applications for increased mobility, e-business, and information security.

U.S. products are well received and 75-80% of imported packaged software is of U.S. origin. The market is highly competitive and customers are looking for products that will make business processes efficient, robust, and flexible.

## **Best Prospects/Services**

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Network security applications  
Business Intelligence Products  
Storage management applications  
Applications for increased mobility

## **Resources**

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Trade Shows:

ICT Malmö  
September 24-25, 2008  
Information and Communications Technology  
<http://www.easyfairs.com/shows/detail.aspx?ShowID=442>

Contacts:

Ministry of Industry, Employment and Communication  
<http://www.industry.ministry.se>

Invest in Sweden Agency (ISA)

<http://www.isa.se>

ITSweden

Information site on the Swedish ICT sector. <http://www.itsweden.se>

U.S. Mission to the European Union, Foreign Commercial Service

<http://www.buyusa.gov/europeanunion/>

Local Commercial Specialist: [gunilla.laroche@mail.doc.gov](mailto:gunilla.laroche@mail.doc.gov)

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## Medical Equipment (MED)

### Overview

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US Million	2005	2006	2007 (estimated)
Total Market Size	2,920	3,051	3,557
Total Local Production	3,222	3,367	3,830
Total Exports	1,820	2,104	2,335
Total Imports	1,518	1,778	2,062
Imports from the U.S.	378	503	563

Exchange rate used

USD 1 equals SEK                      7.48                      7.38                      6.76

The above statistics are unofficial estimates.

Sweden's health system is one of the best and most well developed in the world. The population of just over 9 million enjoys very good health. With an average life expectancy of 78 years for men and 83 years for women, Swedes have the seventh-highest life expectancy in the world. Infant mortality rates are low with 2.76 deaths per 1,000 births. In 2005, health care expenditures were 8.4 % of GDP. These costs, however, are expected to increase in the years to come. As Sweden has a population that is one of the oldest in the world, more than 5 percent are 80 years or older, there will be increasing demand for medical equipment and supplies, and longer medical treatments, to meet the health needs of an ageing population.

U.S. suppliers, dominating the import market, enjoy a good reputation. Major third-country competitors include Germany, Netherlands and Denmark.

### Best Prospects/Services

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The best sales potential during 2008-2010 for U.S. manufactured medical equipment is expected to be in the following areas:

Telemedicine  
Medical informatics  
Non-invasive surgical equipment  
Orthopedic and prosthetic equipment  
Home health care - equipment and supplies

## Resources

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Trade Shows:

Vitalis, May 26-28, 2008  
Telemedicine/e-health

[www.swefair.se](http://www.swefair.se)

Riksstamman, Nov 26-28, 2008

[www.swefair.se](http://www.swefair.se)

Scandinavia's biggest meeting place and know-how forum for everyone employed in the health care and health sectors. Research staff, doctors, nurses, technicians, buyers and many other health care professionals come to this fair to see all the latest and gain an overview of the products now available on the market.

Contacts:

Swedish Medtech

[www.swedishmedtech.se](http://www.swedishmedtech.se)

The Swedish Handicap Institute

[www.hi.se](http://www.hi.se)

National Board of Health & Welfare

[www.socialstyrelsen.se](http://www.socialstyrelsen.se)

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## Drugs & Pharmaceuticals (DRG)

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US Million	2005	2006	2007 (estimated)
Total Market Size	3,380	3,580	4,852

Total Local Production	7,655	8,108	9,556
Total Exports	6,472	6,845	7,470
Total Imports	2,1941,988	2,317	2,766
Imports from the U.S.	140	170	207

(Insert footnote information here)

During the past two decades, the Swedish pharmaceutical industry has grown and established itself as one of Sweden's most important growth industries. Domestic industry is active in research and drug sales in the areas of oncology, growth disorders and eye diseases, gastrointestinal, respiratory and cardiovascular diseases. The Swedish pharmaceutical market is dominated by two firms AstraZeneca (Swedish/British) and Pfizer (U.S.) but there are also a large number of small and medium sized firms active in development and manufacture. These include biotechnology-based drug discovery firms as well as firms focusing on generics, pharmaceutical formulation, drug delivery and contract manufacturing. The U.S. market share (estimated at 43%) is the highest among foreign suppliers. American pharmaceutical firms are considered world-leaders in research and production; consequently their products enjoy a good reputation.

### Best Prospects/Services

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The Swedish pharmaceutical market is highly competitive, but according to trade sources the following areas should represent opportunities for new entrants in the market: antibiotics, anti-asthmatics, impotence treatment, treatments for Alzheimer, AIDS and cancer.

### Resources

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#### Trade Show:

Riksstamman , Nov 26-28, 2008

[www.swefair.se](http://www.swefair.se)

#### Contacts:

The Swedish Association of the Pharmaceutical Industry LIF

[www.lif.se](http://www.lif.se)

Medical Products Agency

[www.mpa.se](http://www.mpa.se)

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### Automotive Parts & Accessories



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US Million	2005	2006	2007 (estimated)
Total Market Size	9,414	9,531	11,551
Total Local Production	8,311	8,765	10,047
Total Exports	3,943	4,579	5,498
Total Imports	5,046	5,345	7,002
Imports from the U.S.	95	94	119

Exchange rates: 7.48 7.38 6.76

The above statistics are unofficial estimates.

Sweden, with a population of about 9 million, had 4.2 million cars in 2006. This corresponds to one car to every 2.2 people. The number of commercial vehicles was 493,000.

Among the EU15 countries, Sweden has the third oldest car population after Finland and Greece. Four out of ten cars in the Swedish car population are older than 10 years old.

The total import of automotive parts and accessories (HS 87.08) was worth US\$ 5.3 billion in 2006. Major supplying countries were Germany (34%), Belgium (9%) and U.K. (7%). US suppliers accounted for 2% percent of the import market.

## Best Products/Services

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The best sales prospects exist for products within the safety and environment sectors. Swedes are very safety conscious and the automotive manufacturers are known to follow high safety standards. The sectors include a wide range of products such as products of high strength steel, telematics, emission and alternative energy technology.

In the aftermarket, a large part of the sales are for collision parts, body panels, car glass and head lights. Approximately 25 percent of the local distributors' turnover are for exhaust systems.

Other products that enjoy good prospects are products that relate to the Swedish climate. Examples are engine heaters for the winter and roof boxes for skis. Steering wheels, rims, mirrors and decorations for the exterior of the car also sell well. Extra lights are also popular, especially as it is very dark for 6 months of the year in Sweden. There is also a growing market for truck aftermarket equipment.

## Resources

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Trade Shows: Lastbil (trucks), Jonkoping, August 20-23, 2008 [www.elmia.se/lastbil](http://www.elmia.se/lastbil)

Trade Organizations: Scandinavian Automotive Suppliers  
<http://www.fordonskomponentgruppen.se/>

The Association of Swedish Wholesalers of Automotive Parts and Accessories  
<http://www.bildelsgrossisterna.se/>

Commercial Trade Specialist: Hakan Vidal [hakan.vidal@mail.doc.gov](mailto:hakan.vidal@mail.doc.gov)

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## Environmental Technologies (POL)

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US Million	2005	2006	2007 (estimated)
Total Market Size	11,764	13,143	16,272
Total Local Production	-	-	-
Total Exports	3,380	4,019	4,983
Total Imports	2,452	2,790	3,208
Imports from the U.S.	181	202	218

Exchange rate used

USD 1 equals SEK                      7.48                      7.38                      6.76

The above statistics are unofficial estimates

\* As current statistics on local production is not readily available the table above indicates actual market turnover as reported by Swentec – The Swedish Environmental Technology Council.

The environment is one of the most important issues of our times. Sweden was among the first countries in the world to recognize the growing environmental problems. Swedish environmental technologies and services firms are active in the areas of air pollution, water and waste water treatment, waste management and recycling. Domestic suppliers of pollution control equipment are strong and world leaders in their respective field, but they look for new development in R&D and the application for new techniques. American products enjoy a good reputation on the market but will find strong competition from both domestic firms as well as third-country suppliers.

### Best Products/Services

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According to trade sources, the market for water treatment control is mature and well covered, while best sales prospects may be found in products and services related to air pollution control, soil remediation and waste management products/techniques.

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Ministry of the Environment

[www.miljo.regeringen.se](http://www.miljo.regeringen.se)

Swedish Environmental Protection Agency	<a href="http://www.environ.se">www.environ.se</a>
Swedish Recycling Industries' Association	<a href="http://www.recycling.se">www.recycling.se</a>
Swentec - Swedish Environmental Technology Council	<a href="http://www.swentec.se">www.swentec.se</a>
Avfall Sverige – Swedish Waste Management	<a href="http://www.avfallsverige.se">www.avfallsverige.se</a>
Varim - Swedish Association of Suppliers of Effluent and Water Treatment Equipment	<a href="http://www.varim.se">www.varim.se</a>
Trade Shows:	
Elmia Waste & Recycling, May 2008	<a href="http://www.elmia.se">www.elmia.se</a>
Eco-Tech Scandinavia, October 7-9, 2008	<a href="http://www.swefair.se">www.swefair.se</a>
Commercial Service Trade Specialist Catharina Kronstrom	<a href="mailto:catharina.kronstrom@mail.doc.gov">catharina.kronstrom@mail.doc.gov</a>

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## Safety & Security

### Overview

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US Million	2005	2006	2007 (estimated)
Total Market Size	3.350	3.750	4.070
Total Local Production	700	900	990
Total Exports	550	750	820
Total Imports	3.200	3.600	3.900
Imports from the U.S.	80	90	100

Exchange rates SEK/USD: 2005 7.48, 2006 7.38 and 2007 6.76

The statistics are unofficial estimates.

The Swedish market for safety and security equipment has grown significantly in the recent years and the current turnover reaches USD 4.9 billion. The estimated annual market growth is 13%. The fastest growing sub-segments are technical security (17%), camera surveillance (16%) and passage control (11%). The whole concept of security thinking has gradually changed in Sweden as the risks for both conventional and cyber terrorism have become more tangible. In addition to the more traditional security

measures, concerns such as BCP, airport and hotel security, access control and CBRN protection have come into focus.

The largest end-user groups of security and safety equipment and services are the public sector, manufacturing and transportation industries, large private companies in the high-tech fields, hotels and companies handling dangerous goods. Private households have in the past been more interested in less complicated security equipment, such as intruder alarms and lattice windows and doors. The demand for more complete domestic protection using latest technologies is, however, rapidly growing.

U.S. products enjoy a good reputation in the Swedish market. The main competitors are the strong and even globally active domestic manufacturers and German and U.K. suppliers. There are no trade barriers or market impediments for security and safety equipment.

### **Best Products/Services**

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The most promising sub-sectors are equipment for both domestic and corporate security and protection, ranging from simple alarms and protective devices to complex systems that integrate fire alarm, passage control, area control and CCTV. Other growing sectors are consulting and guard services and security training sectors. In the IT security market the largest subgroups are identification systems, anti virus programs, PKI, intrusion detection and backup equipment.

### **Opportunities**

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Sweden provides good opportunities for U.S. companies in the field of biometrics, border control and high threat target security. In 2005, Sweden enforced the use of digital passports and identity cards. The new identification and travel documents use facial recognition software, and both documents will at a later date also include a fingerprint image for further identification. Sweden is actively working on the Schengen Information System II project, and assessing potential biometric technologies for border crossing.

There are also good prospects for products and services within electronic locking, access card systems and passage control systems using biometrics and infrared (IR) and radio frequency (RF) technologies.

### **Resources**

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Swedish Police Board [www.polisen.se](http://www.polisen.se)

Swedish Safety & Security Companies [www.swesec.se](http://www.swesec.se)

Ministry of Justice <http://www.sweden.gov.se/sb/d/584>

Nuclear Power Inspectorate [www.ski.se](http://www.ski.se)

## Major Trade Events:

Skydd 2008, Protection and Security Expo

September 30 – October 3, 2008

- Held in Stockholm every other year; the largest safety and security show in Northern Europe

[http://webfair2.stofair.se/Skydd\\_eng/index.asp?language=EN&menulink=2](http://webfair2.stofair.se/Skydd_eng/index.asp?language=EN&menulink=2)

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## Telecommunications Equipment & Services

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US Million	2005	2006	2007 (est.)
Total Market Size	1,530	1,596	1,622
Total Local Production	4,150	4,316 (est.)	4,380
Total Exports	4,374	4,834	4,906
Total Imports	1,754	2,114	2,148
Imports from the U.S.	81*	117*	118*

Exchange rate used

USD 1 equals SEK                      7.48                      7.38                      6.76

The above statistics are unofficial estimates

- Imports from the U.S. are in reality higher as Swedish Customs statistics do not show U.S. goods imported via other EU countries and U.S. production plants within the EU.

### Telecommunications Services

USD million	2005	2006	2007 (est.)
Total Market Size	7,098	7,410	7,100

Exchange rate used

USD 1 equals SEK                      7.48                      7.38                      6.76

The above statistics are unofficial estimates

Sweden is in the forefront in terms of communications in general and wireless communications in particular.

TeliaSonera is the largest provider of fixed telephony followed by Tele2, and Telenor. Mobile phone penetration is extremely high in Sweden, over 100%. There are three

GSM carriers that have their own infrastructure; TeliaSonera, Tele2, and Telenor. Third generation (3G) services are provided by four operators; 3 (Three), TeliaSonera, Tele2, and Telenor and reach 90% of the Swedish population. All told, there are over 20 service providers in the mobile telephony market. IP telephony is gaining ground in the Swedish market, both in the corporate and consumers markets.

It is estimated that around 3.4 million mobile phones were sold in Sweden during 2007. The share of 3G phones is increasing steadily. The market for mobile broadband is booming. Operators are offering mobile broadband with increasingly higher speed, which will boost the market for PC cards, USB modems and high capacity mobile phones

Internet penetration in Sweden is very high. In the age group 15 to 75, around 85% have access to the Internet at home and 47% have access to broadband. ADSL is the dominating form of broadband access, followed by CaTV and LAN. Use of W-LAN is expanding in Sweden. The largest operator, Telia Homerun, has more than 15,000 hotspots throughout the country. Other service providers are Defaultcity, Powernet, Glocalnet, and The Cloud Nordic. Fiber optic infrastructure covers some 200 metro networks in more than 100 towns. These networks are open and neutral, i.e. they offer capacity to any service provider under equal terms, which benefits consumers as they can pick any service provider they wish instead of being locked in with one provider.

Around four million households in Sweden have access to at least one television set. Broadcasts are provided via terrestrial, cable or satellite means. The Swedish Parliament decided in 2003 that Sweden would discontinue analog TV broadcasting and shift to digital. The process started in 2005 and was completed during the fall of 2007. Consequently, all terrestrial TV broadcasting in Sweden is now digital.

## **Best Products/Services**

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Wireless Broadband  
VoIP Telephony  
Triple Play  
Wireless communications hardware and software

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Trade Shows:

ICT Malmö  
September 24-25, 2008  
Information and Communications Technology  
<http://www.easyfairs.com/shows/detail.aspx?ShowID=442>

Contacts:

Ministry of Industry, Employment and Communication  
<http://www.industry.ministry.se>

Invest in Sweden Agency (ISA)  
<http://www.isa.se>

ITSweden  
Information site on the Swedish ICT sector. <http://www.itsweden.se>

U.S. Mission to the European Union, Foreign Commercial Service  
<http://www.buyusa.gov/europeanunion/>

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## **Agricultural Sectors**

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Data Table - \$Millions	2004	2005	2006 (estimated)
#Total Market Size	48,751	49,153	50,200
Total Local Production	48,500	49,000	50,000
Total Exports	8,672	9,396	10,300
Total Imports	8,923	9,549	10,500
Imports from the U.S.	122	176	173
Average exchange rate CY	7.35	7.48	7.38

Source #Swedish SCB ([www.scb.se](http://www.scb.se))

Note: The above statistics are unofficial estimates

Due to the severe Nordic winters and relatively short growing season, Sweden relies heavily on imported food and agricultural products. In 2005, imports of agricultural, fish and forestry products totaled US\$ 9,549 million, which accounted for 2 percent of the Swedish total import value. Agricultural products in Sweden are subject to the EU standard import licensing system, EU-wide quotas, import taxes and other provisions required of European member states. Sweden has maintained the right to continue some of its pre-EU membership food safety standards during a transitional period. Most of these national standards are tougher than those of the EU. For example, within the dairy, livestock and poultry sector, Sweden maintains what is essentially a zero tolerance for salmonella. In all other respects, Sweden conforms to EU regulations.

Best Products/Services

Best prospects: - wine, beer, dried fruits and nuts, seafood, healthy snacks, ethnic foods, organic foods, health and diet foods, convenience foods, frozen juices, rice and rice mixes, processed fruits and vegetables, fresh fruits, confectionery and pet food.

### Opportunities

The Swedish consumer is gravitating towards fresher, healthier, more convenient and more nutritious foods. High demands are made on food quality. Swedes are concerned about where products are from and how they were produced. Swedish consumers are moving away from their culinary traditions as they become more open to new and exotic cuisine. The weaker dollar exchange rate has fueled new interest in U.S. products.

### Resources

For current data on agricultural trade prospects with Sweden, the reader is referred to the following Internet site: [www.usemb.se/Agriculture](http://www.usemb.se/Agriculture). The USDA office in Stockholm, which has regional responsibility for Sweden, Finland, Norway, Latvia and Estonia, maintains the site. The Internet site content includes an analytical overview of agricultural marketing opportunities and reports, marketing activities of possible interest to U.S. firms, an array of exporter/importer services and links to sites containing a detailed current breakdown of individual country imports/exports of agricultural products subdivided into several product categories (bulk, intermediate, consumer-oriented, forestry and fishery).



